

Client:	PPS Investments
Business Partner:	iSquared
Product/Software:	SalesLogix
Operating System:	Windows Server 2003
Database:	SQL 2005
Number of users:	30
Country:	South Africa
Date:	2008

Client profile

PPSI caters for the investment requirements of 185 000 members of the Professional Provident Society of South Africa by providing a comprehensive range of investment, savings and retirement products.

The challenge

With an entirely new staff, and the need to correctly track the investments of, potentially, 185 000 investors, PPSI had the opportunity to implement a CRM system that delivered, from the start. Battersby explains that as PPSI's products are largely intermediated, they needed to implement CRM that could cater for the supply chain, starting with the investor and ending with the PPSI servicing point. Due to the nature of this convoluted supply chain, the company also required a daily view of the assets categorised according to the various tiers of the supply chain.

The solution

Faced with the opportunity to get CRM right first time, Professional Provident Society Investments (PPSI) hit the nail on the head with Softline Enterprise's award-winning CRM solution, SalesLogix, using the expertise of strategic business partner iSquared to implement this magic wand of customer service delivery.

CEO of PPSI Nick Battersby says that what prompted the implementation of SalesLogix was his previous experience with this user-friendly solution. "When I was employed at Coronation Fund Managers, I was tasked with implementing SalesLogix there and was extremely impressed with the product," Battersby said.

With extensive experience and expertise in the financial services industry, the iSquared team was able to gain fast and accurate insight into the specific solution requirements of PPSI, says James Beaumont, CEO, iSquared. "PPSI was clear and focused in its business objectives, from the start. With this accurate expectation from our client, we could easily translate their needs into the appropriate functional and technical specifications. The team work was textbook and the project was delivered to specification, on time and within budget – something which is virtually unheard of today!"

SalesLogix delivered on all PPSI's needs. The implementation was smooth and the integration of the underlying data feeds seamless, Beaumont says. "We were able to deliver a very cost effective, turn-key solution due to our ability to fulfill the functions of project management, business analysis, software development and system engineering and architecture."

The benefits

The main beneficiaries of SalesLogix at PPSI have been the sales and client service teams: The sales team can now see what their various regions are producing and also assess engagement with brokers. The client service teams perform many administrative follow-ups and the ability to share communication throughout the team easily is significant.

"As a growing business, every relationship is critical and with SalesLogix we have a single view of all interaction with respective investors and can also easily link from that record to the supply chain associated with the investor," says Battersby. "Our ability to store all communication including attachments and notes of verbal meetings is very useful."

The Future

Battersby says that being able to use SalesLogix remotely would be an added bonus and it would be extremely helpful to access it via his Windows mobile phone when travelling. Beaumont says that an infrastructure update is expected in June, and this will enable SalesLogix remote functionality. "We are also currently assessing the viability of mobile phone access."